

Go-To-Market with Merge

How to successfully market your product integrations

For Marketing Teams



Welcome to Merge

This guide is designed for **marketing teams**.

Merge is one API to add hundreds of integrations to your product. Merge's platform makes secure data access easy by offering Unified APIs across key software categories, including HRIS, accounting, CRM, file storage, and more. Over thousands of customers across all industries and sizes use Merge to power their integrations at scale.

Below you'll find a collection of resources to help market your integrations, including messaging frameworks to highlight in your marketing, how to authorize integrations via Merge Link, and further resources in the Appendix to better understand Merge and the integrations space.

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Resources to market your integrations

Drive awareness of new integrations

Identify your marketing channels to reach prospects and customers about the added value of these integrations powered by Merge



Value to prospects

Close deals with more integrations now supported



Value to customers

Drive higher customer satisfaction & product usage

Marketing resources to leverage

Reach out if there's anything else we can help provide to support your marketing efforts

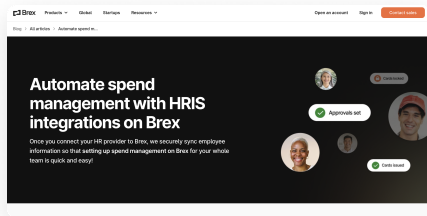
Resource	How to Use It
Integrations metadata endpoint	Programmatically create an integrations menu or marketplace for your product (example from Drata)
Press release template	Media announcement on your product's newly launched integrations
Pre-written tweet	Social media announcement: ability to customize it and link to your integrations page or blog post
Seamless & secure integrations using Merge PDF	PDF to send to your customers to learn more about Merge and why it's secure

Examples

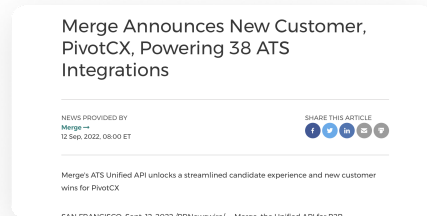
Marketing channels

Draw some inspiration from our customers on how to market your integrations

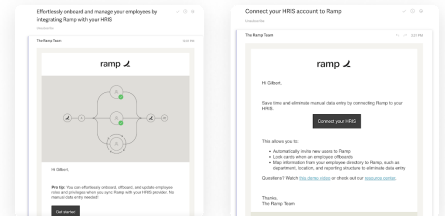
Blog



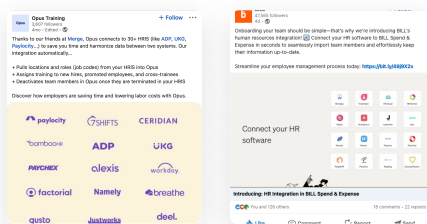
Press Release



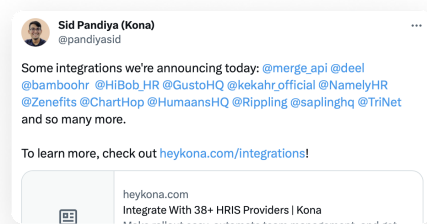
Email



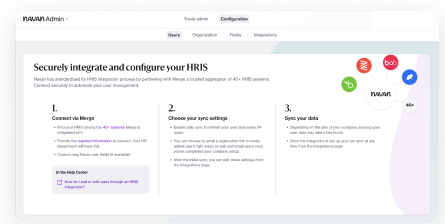
LinkedIn



Twitter



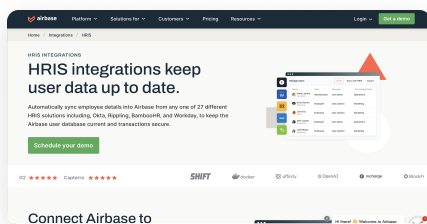
In-product Guidance



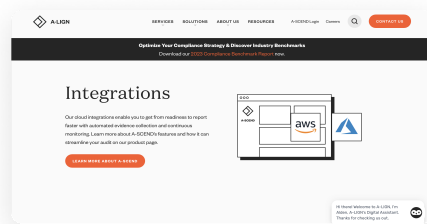
The integration marketplace

It's important to highlight to your customers and prospects where to find your available integrations. Use the Merge [integration metadata endpoint](#) to dynamically populate your site's integration marketplace!

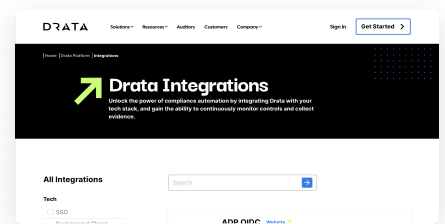
Airbase



A-LIGN



Drata



Key messaging frameworks

Key benefits to highlight in your marketing

1. Breadth of integrations supported

Showcase the volume of integrations

Template 1

"[Company] now connects to [xx+] [category] powered by Merge. With just a few clicks using Merge Link, you're able to seamlessly authorize your [category] platform to our product, saving you time and potential headaches when sharing data between these two systems."

Example 1

"Acme now connects to 40+ HRIS powered by Merge, including Workday, BambooHR, and Zenefits! With just a few clicks using Merge Link, you're able to seamlessly authorize your [category] platform to our product, saving you time and potential headaches when sharing data between these two systems."

Template 2

"[Your company name eg. Ramp] partnered with Merge because of the speed at which their Platform and development teams move to add new integrations across different categories. Customer feedback and demand prioritize the next integrations they add. You can also check out their [Changelog](#) for the latest updates."

Example 2

"Acme partnered with Merge because of the speed at which their Platform and development teams move to add new integrations across different categories. Customer feedback and demand prioritize the next integrations they add. You can also check out their [Changelog](#) for the latest updates."

2. Seamless authorization for your customers

Emphasize how easy it is for your customers

Template

"With just a few clicks using Merge Link, you're able to seamlessly authorize your [category] platform to [company name], saving you time and any potential headache when sharing data between these two systems."

Example

"With just a few clicks using Merge Link, you're able to seamlessly authorize your HRIS platform to Acme saving you time and any potential headache when sharing data between these two systems."

3. Use case being solved and customer benefits

The more specific the better

Template

“Our integration will automatically pull in [field data name] into our product to support [use case]. This eliminates any manual work in updating multiple systems.”

Example

“Our integration with your HR platform automatically pulls in employee data into Acme to automatically provision corporate credit cards. This eliminates any manual work in both updating multiple systems and sending out corporate cards to new employees.”

4. Data security and permissions

Emphasize that all authorized data is secure. You can share Merge’s [Trust Center](#) and a summary of our [General Data Protection Regulation \(GDPR\)](#) controls for additional details.

Template

“All data is securely processed and stored following industry best practices, including ISO 27001 and SOC 2 Type II, and complies with privacy regulations like HIPAA, GDPR, and CCPA. Furthermore, for every integration and data field, we can set permissions for what data is being passed. For example if PII data does not need to be shared, we can restrict that data so it does not ever leave your [category] platform.”

Example

“All data is securely processed and stored following industry best practices, including ISO 27001 and SOC 2 Type II, and complies with privacy regulations like HIPAA, GDPR, and CCPA. Furthermore, for every integration and data field, we can set permissions for what data is being passed. For example if PII data does not need to be shared, we can restrict that data so it does not ever leave your HR platform.”

5. Responsive customer support

Merge will support your team as you navigate issues that your customers encounter

Template

“With Merge, each integration is maintained and continuously syncing. If any issues occur, our customer support team can leverage both the Merge Issues Dashboard and the Merge support team to quickly troubleshoot and resolve any issues.”

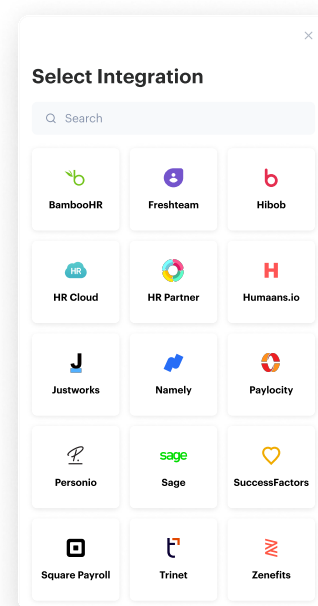


How to authorize integrations

Using Merge Link to authorize integrations

Your customers will use Merge Link, Merge's user-friendly interface. Merge Link lives in your app and shows all the integration options that you offer.

Your customers simply have to follow the instructions on a few screens to authorize an integration.



Guiding your customers on Merge Link

Use the below messaging to help your customers use Merge Link

1. You will be guided through a simple flow of a few screens to authorize and create a secure integration. Note that the method of authorization will depend on the requirements set by the software provider.

2. Once you successfully authorizes an integration, you are all set and can close out of the Merge Link screen. The data should start to sync between your [category] platform and our app after a successful authorization. It's as easy as a few clicks!

Appendix

Gain a broader understanding of Merge and the integrations space

Frequently Asked Questions

Q: What is the process if I want to do a press release around our integrations being powered by Merge?

A: We would love to do a joint press release! Please reach out to our marketing team at <marketing@merge.dev>.

Q: My customer wants to learn more about Merge, how it works, and why they should trust it. Are there any details or assets you can provide?

A: Yes, we have a [PDF](#) that you can send to your customer that explains what Merge is and why it's secure and seamless.

Though you don't need to mention Merge in your marketing materials, you can say the following to explain Merge: "Our integrations are powered by Merge. Merge acts as a sub-processor to sync and store your data securely and safely, while reducing any issues and downtime impact. Merge processes data on our behalf."

Q: Do I have to share to all of my customers about Merge?

A: You don't need to necessarily share Merge to your customers, but focus marketing your now available integrations. You can consider adding Merge as a sub-processor if you get questions.

We also encourage you to roll out a beta process when rolling out integrations powered by Merge where you work with a select group of customers before widely marketing it. We encourage that all your customers can integrate their systems together using Merge.

Q: Will you help support our marketing by amplifying our announcements?

A: Yes! We would love to share and repost any social posts. Please make sure to tag Merge when you post to help us easily find it and reach out to us directly at <marketing@merge.dev>.

**Q: I have a great use case / success story of how we're using Merge.
Can I be a customer story?**

A: Yes! We love customer stories and highlighting them wherever we can. Please reach out to your Customer Success Manager or to our marketing team at <marketing@merge.dev>.

The integration problem

Understand the integration problem that Merge is helping to solve and why integrations are important to your customers

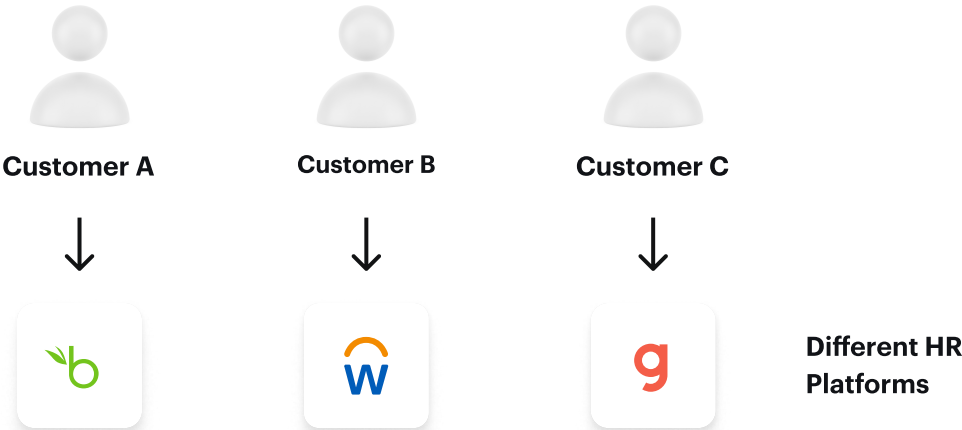
Integrations are a competitive advantage

Providing integrations is fundamental in bringing value to your customers

- ✓ **39%** of buyers look at “integration potential with currently owned software” as the **most important factor** when selecting a provider (Gartner 2023 Global Software Buying Trends).
- ✓ **Integrations** automatically connect data between various platforms, increasing productivity and transforming business operations.
- ✓ **Connecting data** increases your product value and delivers better customer success.

Fragmented SaaS economy

Companies use a lot of software; some report up to 211 applications. Building one integration is time-consuming and resource intensive, and your customers are likely using different platforms in the same category.



Core messaging

Ensure that your customers understand Merge so they can trust the way you offer integrations

Merge messaging framework

1. "Merge is an API provider of B2B integrations that companies leverage to add hundreds of integrations to their product. This allows our customers, like yourself, to securely authorize and access data from hundreds of software providers."
2. "By offering integrations through Merge, we are able to reduce friction and seamlessly enhance our product experience."
3. "Merge is trusted and used by over thousand of companies across all industries and sizes, including Drata, Ramp, Navan, Gong, and Semgrep."
4. "Merge is a dedicated integrations provider who brings expertise and robust monitoring, resulting in a significant reduction in issues and downtime impact for our customers."

Feature messaging

Use the following language if your customers are looking to understand the value that Merge provides, including features and data security



Connect effortlessly

“Merge enables you to connect your preferred software provider to [Company Name] in seconds in order to easily share relevant data.”



Share your data securely

“Merge is built to protect your data in accordance to industry-standard compliance frameworks including SOC 2 Type II and ISO 27001, and complies with privacy regulations like HIPAA, GDPR, and CCPA.”



Experience top-tier support

“Merge helps us proactively identify and alert you if there are any issues with your connection, reducing downtime impact.”

Security features with Merge

Because Merge stores end user data, it has been designed from the ground up to adhere with the industry’s highest standards of security and privacy.

SOC 2, ISO, HIPAA, GDPR

Merge is SOC 2 Type II, ISO 27001, HIPAA, and GDPR compliant. You can see more in our [Trust Center](#) for our real-time security and compliance posture in our continuous control monitoring dashboard.



SOC II Type 2



ISO 27001



HIPAA



GDPR

Data security at the highest levels of industry standards



Uptime

Fault-tolerant infrastructure ensures availability even during extreme demand.



Data centers

All data is stored in Amazon Web Services (AWS) data centers in North America and Europe with enterprise-grade physical and network security.



Encryption

Data is encrypted at rest and in transit, and PII is protected with an additional layer of application encryption.



Defense in depth

Merge maintains separate networks for web servers and databases, detects and logs access to systems, and grants unique credentials for each employee and tool.



Shift left

Our developers are proactive when it comes to security and use both DAST and SAST security scanning tools.



Penetration testing

Our security team conducts penetration testing every year and an automated scan on a weekly basis.

Merge customers are driving customer acquisition

Search... Unified API Company Size Region Industry Sort by

Showing 23 of 23

AdeptID
How AdeptID Achieves Data Exports in Minutes with Merge
HRIS ATS

assemble
How Assemble is Changing Compensation Management with Merge
HRIS ATS

ASSEMBLY
How Merge Unblocked 10x in Sales for Assembly
HRIS filestorage

Avenue
How Avenue Took Dozens of

CAUSAL
How Causal Sped Up Their Self-

confido
Confido Integrates Accounting

Check out our case studies!

Read how other B2B companies are using Merge to better serve their customers.

[View all case studies >](#)

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